Heathrow – Future Proofing of Infrastructure

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Heathrow
Making every journey better
Agenda

Overview of Heathrow

Heathrow strategy

Demand forecasting

Masterplanning

Factors that shape our masterplans

Heathrow past, present and future
Welcome to Heathrow – A complex city

- 70 million passengers each year – 185,000 every day
- 476,000 flights per year – 86 airlines, 183 destinations
- 2 runways – operating at 99% capacity
- 76,000 people work at Heathrow
- 100,000 additional local jobs are supported by Heathrow
- 323 companies work at Heathrow
Heathrow has three competitive advantages

**UK’s direct connection to the world**
- **West London catchments**
- **Surface access infrastructure**

**Europe’s hub of choice**
- **Air Hub**

**Making every journey better**
- **Service proposition “MEJB”**
- **Heathrow Brand**

**Why is it hard to copy?**
- Infrastructure sunk costs and lead times

**Know-how and image built up over time**
- Virtuous cycle of hub network
Our vision: **Become the UK’s direct connection to the world and Europe’s hub of choice by making every journey better**
Future Demand Forecasting

Passenger numbers
Plane types – size, weight, technology
Airline alliances and airline ownership
Competitors
Social trends
Passenger expectations
Airline requirements
Environmental
Technological
Political
Masterplanning

Runway Capacity
Stand Capacity
Terminal Capacity
Surface Access
Infrastructure
- Heating
- Cooling
- Power
- Aircraft fuel systems
- Drainage
- Communications and IT
- Baggage
Updated 2R Masterplan to meet 80mppa 2030 demand forecast

T5 Campus
- T5A not extended
- Fuel farm to remain long term
- E & F Taxiways moved westward to improve alignment for D satellite

T2 Campus
- T2A needs to be larger than Phase 2 ‘red-line’
- E Satellite not required, but safeguarded for upturn / ATM growth scenarios
- T3IB usage by T2 post T3 closure opportunities

Connectivity & Surface Access
- Viable TTS route across CTA
- Southern Road Tunnel requirement
Understanding the timing to further Masterplan development

Blue line: Proposed £3bn investment path maintains stand supply ahead of forecast demand through Q7/8

Green line / area: Do nothing capex scenario will constrain stand supply in Q7/8 which will result in decreased resilience, pier service level drop & aircraft upgrades being turned away.

Projected stand supply to meet demand

Assumes northern taxiways upgraded for A380, But T2B not finished & T1 apron not reconfigured.
Stage 7 – 33kV network complete
Environmental Factors

Climate Change
Air Quality
Technological Factors

Wireless communications
IT - common infrastructure
Political Factors

Security
Planning conditions and building regulations
Deregulation of air transport
A New Approach
Heathrow’s options for connecting the UK to growth

Option 1:
Third Runway
North West

We have one of the world’s most successful hub airports in Heathrow. The UK can choose to build on strength, and connect to economic growth more quickly and at lower cost than any other option, all while reducing Heathrow’s overall noise footprint. Or start again from scratch.

Option 2:
Third Runway
South West

We believe there’s a compelling case for expanding our airport, so we’ve submitted our options for a three-runway Heathrow to the Airports Commission. To find out more visit the hub or www.heathrow.com/newapproach.

Option 3:
Third Runway
North

Look out for a printed summary of our options, or download it to your smartphone by using the QR code.

Heathrow
Making every journey better
Economic Factors

Airline ownership
Safeguarding
Regulation
Transfer passengers
Reducing operational cost
We’ve transformed the airport in the last 10 years

Heathrow 2002
Heathrow “Tomorrow”
2 Runway Heathrow Master Plan
The next step towards the master plan
Our new T2 opens in June 2014....